

Per California Code of Regulations, title 2, section 548.5, the following information will be posted to CalHR's Career Executive Assignment Action Proposals website for 30 calendar days when departments propose new CEA concepts or major revisions to existing CEA concepts. Presence of the department-submitted CEA Action Proposal information on CalHR's website does not indicate CalHR support for the proposal.

A. GENERAL INFORMATION

1. Date

2022-10-18

2. Department

Office of Data and Innovation

3. Organizational Placement (Division/Branch/Office Name)

CalData / Advanced Analytics and Evaluation

4. CEA Position Title

Analytics Manager

5. Summary of proposed position description and how it relates to the program's mission or purpose.
(2-3 sentences)

The mission of the California Office of Data & Innovation (ODI) is to change the way the state approaches business and technology investments to ensure all state government services are efficiently delivered and easily accessed. This CEA will oversee the development and execution of analytical projects, develop quality and process standards to ensure complete and accurate analytical work, and set baseline standards for agile methods and processes applied to analytical projects.

6. Reports to: (*Class Title/Level*)

Deputy Director, Advanced Analytics and Evaluation

7. Relationship with Department Director (*Select one*)

- ☐ Member of department's Executive Management Team, and has frequent contact with director on a wide range of department-wide issues.
- ☒ Not a member of department's Executive Management Team but has frequent contact with the Executive Management Team on policy issues.

(*Explain*):

This position will regularly report to the director and CDO, two of the executive members, on the status of all client projects, overall program, and implementation of standards and guidance. Our executive management team consists of the Director, GC, CDO (Joy), and Chief Deputy Director. CEA's report into our Deputy directors in ODI.

8. Organizational Level (*Select one*)

- ☐ 1st ☐ 2nd ☒ 3rd ☐ 4th ☐ 5th (mega departments only - 17,001+ allocated positions)

B. SUMMARY OF REQUEST

9. What are the duties and responsibilities of the CEA position? Be specific and provide examples.

Develop and refine a solicitation process, policies, and strategy for identifying and vetting analytical projects with departments across the state

Identify and document common analytical gaps of department clients, and work with Deputy Director of Program and Policy on wider programmatic offerings in to meet those gaps

Develop and refine policies and procedures to ensure projects are implemented quickly and ethically

Develop and refine policies and procedures to ensure projects are handed off to client departments appropriately and sustainably

Advise the Deputy Director, Advanced Analytics and Evaluation in the formulation of analytical standards and best practices

Identify root causes of project delays and communicate those to Deputy Director for Advanced Analytics and Evaluation for longer term policy and standards changes

Develop statewide standards and policies, including implementing guidance, for advanced analytics using input from a diverse set of stakeholders and entities

Track and manage project related budgets and resources to ensure appropriate allocation

Facilitate meetings with client partners and client leadership to align on project scope and sprint deliverables

Issue timely updates on projects to internal and external stakeholders

Develop system for tracking a portfolio of analytical projects

Assess the needs of the team and request necessary information from clients in order to complete projects or to adjust to new findings during projects.

Develop agendas and hold recurring team meetings for project delivery

Serve as primary point of contact for client projects including interfacing with staff and leadership in client organizations

Manage the successful completion and milestones of client projects including meeting with stakeholders at every level of the organization and communicating updates and changes in status clearly

Hold recurring internal meetings with the team to ensure project delivery, develop lessons learned from projects that inform future work and policies, and proactively manage risks

Develop project plan and expectations including the development of project charters with clients, and ensure senior leadership understand the nature and direction of the project

Hold pre and post mortem meetings on projects with CalData project team to identify policy, process, or standards changes needed

Conduct user, policy, and context research to support projects including but not limited to user interviews, usability testing, landscape analysis, document reviews, and policy analysis.

Facilitate user research sessions in collaboration with ODI research team on advanced analytics products developed for clients

Conduct quantitative analysis for department projects, when appropriate, in support of projects meeting key deadlines

Present the results of research to team members, ODI leadership, and staff and leadership in client departments

Lead the facilitation and application of the CalData AI and ethics framework and toolkit for all CalData projects

Collaborate with the Program and Policy team to iterate and improve the toolkit

Collaborate with ODI internal teams and ODI leadership on strategy & business development for advanced analytics projects and implementing

Advise ODI Leadership on systems level change and opportunities for statewide policy changes on how government performs analytical work

Partner with ODI leadership to understand partner needs, industry trends, and opportunities that align with ODI's capabilities to grow the agency's portfolio

Coordinate with ODI management to prioritize problem areas for project execution in order to direct resources and efforts for analytical work

Work to continuously improve Advanced Analytics and Evaluation service, in collaboration with the Deputy Director and team

Partner with the ODI Data Programs and Policy team to identify areas of opportunity to advance our analytical practices, policies, and procedures

Research and stay abreast of trends and developments in analytics project management and tooling

Apply principles, practices, and trends of public administration, including management, organization, planning, cost/benefit analysis, budgeting, and project management, and perform other staff assignments as appropriate and required

Execute programs, policies, and platforms that support data and innovation

B. SUMMARY OF REQUEST (continued)

10. How critical is the program's mission or purpose to the department's mission as a whole? Include a description of the degree to which the program is critical to the department's mission.

- ☒ Program is directly related to department's primary mission and is critical to achieving the department's goals.
- ☐ Program is indirectly related to department's primary mission.
- ☐ Program plays a supporting role in achieving department's mission (i.e., budget, personnel, other admin functions).

Description: Per the California Government Code section 12815, the mission at the Office of Data and Innovation (ODI) is to deliver better government services to the people of California through human-centered design, technology, and data. The Advanced Analytics and Evaluation program is mission critical to deliver on its mission and strategic directives. This position will be setting and refining the engagement approach with ODI clients on Advanced Analytics projects to help State government use data to inform decisions, improve the delivery of services, and ultimately improve the lives of Californians. They will be the face of project and outcomes delivery to state departments using advanced analytics, setting the standard for applied analytics across the state. This is a particularly important area identified during the Chief Data Officer's listening tour. Many stakeholders identified that they wanted to get to advanced analytics work in their organizations, but didn't know the path forward. This team and role will build that path. The CEA will set the standards, policies and procedures for ODI's internal analytics work to ensure it's of high quality and answers real questions that can impact the lives of Californians. This team and the CEA will be both external facing (working directly with clients on projects) and internal facing (helping other ODI teams leverage analytics to support and inform their work).

B. SUMMARY OF REQUEST (continued)

11. Describe what has changed that makes this request necessary. Explain how the change justifies the current request. Be specific and provide examples.

With the recent merger of CalData into ODI, data has gained a new emphasis for the organization's work. Data has always been critical to informing user research, business process improvement, and innovation to transform government services. While important, the data function relied primarily on vendors and the organization didn't have the time to step back. With the growth of the organization, it is more important than ever to develop policies and standards to inform how we approach advanced analytics. Without this critical role, ODI runs the risk of siloing different approaches to this, relying on vendors that may not actually be best suited for work, and not getting consistent and effective outcomes for ODI's client departments. Furthermore, an uncoordinated approach to the policies, procedures and practices could actually cause unintended harm to Californians. For example, as ODI engages with third party contractors and vendors, there is a risk that the models and analysis were not vetted to understand the potential impact or risks of the methods. If ODI has work related to benefits, prioritization of clients, or other analysis that impacts the lives of Californians, a poor or opaque analysis could result in benefits being denied, the wrong clients being prioritized or deprioritized, or other outcomes that negatively impact the health, safety, and financial security of Californians. Many external parties promise the world with analytics to get in the door, but their analysis techniques may not adhere to ethical principles and best practices for applied analytics. As part of the maturation of ODI, there are needs for high-level leadership positions within the organization and this request reflects one of those needs. This position was approved in FY22/23 BCP as part of the merger.

C. ROLE IN POLICY INFLUENCE

12. Provide 3-5 specific examples of policy areas over which the CEA position will be the principle policy maker. Each example should cite a policy that would have an identifiable impact. Include a description of the statewide impact of the assigned program.

The state has largely lagged in its adoption of advanced analytics best practices. There is interest across the state in doing so, but not many compelling examples of advanced analytics teams and processes being set up in the public sector context. The Analytics Manager will be the principal statewide expert on implementing advanced analytics projects and processes. They will have an outsized impact on the State's approach given the mission and function of the Office of Data and Innovation. As capacity builders, ODI is uniquely positioned to provide guidance, policies, and standards to CA departments around advanced analytics.

The Analytics Manager will be responsible for accelerating adoption of advanced analytics and evaluation practices across the state. They will have principal responsibility for developing policies, procedures, and standards that help remove barriers for departments to adopting those practices. They will run client projects with departments, leveraging this real experience working with departments to craft guidance and policies that are tailored to the state context.

The Analytics Manager will develop standards for defining and scoping advanced analytics work. They will do this through applied and iterative work with departments, encapsulating learnings into policies, standards and playbooks for defining and scoping this work. This work will have statewide impact helping departments to rely less on contractors and vendors for this work, and when they need to, helping them to better manage those contractors or vendors to ensure high quality analytical work on behalf of the state.

The Analytics Manager will work closely with the Data Programs and Policies team to define practical approaches to embedding equity and the ethical use of data into analytical work. They will define and contribute to standards that data teams can put into practice. The Analytics Manager will not only set those standards, but will be refining and developing them through real hands-on work. This ensures that policies and standards are grounded in real experience. This role will ensure the operational policies of the advanced analytics team adheres to existing privacy policies and practices and through client work identify gaps in the current policies and collaboratively working with Program and Policy team to identify changes to address.

Currently there are very few departments implementing advanced analytical pipelines that run at scale in a production-grade environment. Here the Analytics Manager will provide a cross-cutting lens of people, process and technology to develop policies, standards, and procedures for running these pipelines while ensuring high quality outputs. They will develop nuanced and tailored guidance that takes into account the operational processes for ensuring advanced analytics gets appropriate care and feeding in particular to mitigate any unintended harms to Californians.

C. ROLE IN POLICY INFLUENCE (continued)

13. What is the CEA position's scope and nature of decision-making authority?

The CEA serves as the principle policy maker and advisor to the Deputy Director, Advanced Analytics and Evaluation on policy related to defining and scoping advanced analytics projects, embedding equity in analytical work, implementing advanced analytics pipelines, and structuring data teams for impact. The policies they develop have large impact and statewide visibility. We will be fielding high priority analytical projects at ODI over which the Analytics Manager will have a key role in shepherding projects from beginning to end. These advanced analytical projects will touch topics including but not limited to health and human services, education, climate change and the environment, emergency response, and more. The Analytics Manager will need to make decisions with input on which advanced analytics projects the Advanced Analytics and Evaluation team is equipped to take on. They will need to balance multiple criteria and competing priorities and navigate potentially sensitive subject matter areas. They will advise the Deputy Director, Advanced Analytics and Evaluation on any potential or emerging issues on projects and offer course corrections to ensure successful outcomes. To ensure policies are appropriate and can be implemented, this position must consider new and/or revised state and federal legislation that could impact analytical work and advise ODI Leadership on implications of proposed legislation.

This position provides strategic leadership and technical, and operational leadership for successful implementation of analytical work across ODI and ensures that the Advanced Analytics and Evaluation program is technically sound, produces high quality analysis, and consistent with the department's and stakeholders' priorities. This will include allocating budget amounts as part of the Data and Innovation Fund as well as managing contractors in support of additional project and program work.

14. Will the CEA position be developing and implementing new policy, or interpreting and implementing existing policy? How?

This position will be developing and implementing new policies, as state and federal legislation, regulations, and policies change and are updated as well as interpreting and implementing existing policies related to advanced analytics, artificial intelligence, and data privacy. The Analytics Manager will need to ensure that the internal policies are consistent with State and Federal law related to data use and sharing. This will involve work not only within the department and with existing stakeholders, but coordinating with other entities such as the Governor's Office, California Department of Technology, GovOps, California Health and Human Services, Employment Development Department, Department of General Services, Labor & Workforce Development Agency, etc. to identify, define and deploy new policies and procedures with impact across state agencies and directly impacting Californians. The CEA will consistently consider sustainability in practice to ensure policies and procedures can be easily updated to accommodate evolving business and stakeholder needs.